

Back-Office Readiness Checklist

A 20-Point Audit of the Systems, SOPs, and Financial Hygiene Every Growing Business Should Have in Place

Scoring: 0 = Not Implemented | 1 = Partially Implemented | 2 = Fully Implemented

Total Possible Score: 40 Points

Financial Management

1. Bookkeeping System

■ Score: ___ / 2

2. Profit & Loss Reporting

■ Score: ___ / 2

3. Cash Flow Monitoring

■ Score: ___ / 2

4. Job Costing System

■ Score: ___ / 2

5. Budget & Financial Targets

■ Score: ___ / 2

Operations & Processes

6. Written Standard Operating Procedures (SOPs)

■ Score: ___ / 2

7. Employee Onboarding Process

■ Score: ___ / 2

8. Client Onboarding Process

■ Score: ___ / 2

9. Project Management System

■ Score: ___ / 2

10. Task Accountability System

■ Score: ___ / 2

Sales & Marketing

11. Sales Process Documentation

■ Score: ___ / 2

12. Lead Tracking System

■ Score: ___ / 2

13. Marketing Performance Tracking

■ Score: ___ / 2

14. Customer Follow-Up System

■ Score: ___ / 2

15. Online Reputation Management

■ Score: ___ / 2

Leadership & Business Growth

16. KPI Dashboard

■ Score: ___ / 2

17. Organizational Structure

■ Score: ___ / 2

18. Strategic Growth Plan

■ Score: ___ / 2

19. Risk Management & Business Continuity

■ Score: ___ / 2

20. Technology & Systems Integration

■ Score: ___ / 2

Results

0–15 Points: Foundation Stage – Significant opportunities exist to improve organization, profitability, and scalability.

16–25 Points: Growth Stage – Core systems are in place, but inconsistencies may be limiting growth.

26–35 Points: Momentum Stage – Strong operational foundations and positioned for controlled growth.

36–40 Points: Boardroom Stage – Highly organized, scalable operation with executive-level systems.

Recommended Action Plan

Foundation Stage: Bookkeeping, SOPs, Client Onboarding, Project Management, Sales Processes

Growth Stage: KPI Tracking, Accountability, Marketing ROI, Automation, Cash Flow Forecasting

Momentum Stage: Leadership Development, Reporting, Strategic Planning, Optimization, Team Expansion

Boardroom Stage: Scaling Systems, Executive Dashboards, Acquisitions, Expansion, Wealth Creation

Final Score: _____ / 40

Business Readiness Level: _____

Top 3 Priorities for Improvement:

1. _____

2. _____

3. _____

Next Review Date: _____

Back Office Solutions™

Building the systems behind successful businesses.